

Message Text

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ORIGIN COME-00

INFO OCT-01 EUR-25 ISO-00 EB-11 RSC-01 /038 R

66610

DRAFTED BY: COM/BIC/OIM/MRD:KWRIGHT:YLH

APPROVED BY: EB/OCA/REP:LKLIEFORTH

COM/BIC/OIM/MRD:NBASSETT

COM/BIC/OIM/RCS:CGENDREAU-216

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R 302001Z AUG 74

FM SECSTATE WASHDC

TO AMCONSUL MILAN

INFO AMEMBASSY ROME

UNCLAS STATE 191460

E.O. 11652: N/A

TAGS: BEXP, BFOL, IT

SUBJ: GLOBAL MARKET RESEARCH: FOOD PROCESSING AND

PACKAGING EQUIPMENT - ITALY

REF: STATE A-1665

1. MARKET RESEARCH DIVISION (MRD) HAS REVIEWED REPORT PREPARED BY JOHN L. BARISONE AND FOUND CONTRACTOR HAS NOT SATISFIED RESEARCH SPECIFICATIONS. REPORT CONTAINS STATISTICAL ERRORS AND DISCREPANCIES AND OMITTS REQUIRED INFORMATION IN SOME IMPORTANT AREAS.

2. ACTION REQUESTED

TRANSMIT COPY FOLLOWING ANALYSIS OF REPORT TO JOHN L. BARISONE SOONEST AND OBTAIN COMMITMENT THAT HE WILL SUBMIT INFORMATION REQUIRED TO AMCONSUL BY SEPT 13.

3. FINAL PAYMENT TO CONTRACTOR WILL BE APPROVED UPON RECEIPT AND ACCEPTANCE BY COMMERCE OF SUPPLEMENTARY INFORMATION REQUESTED IN ANALYSIS.

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4. ANALYSIS OF JOHN L. BARISONE REPORT (FOR CONTRACTOR)

THIS ANALYSIS IS ORGANIZED IN ACCORDANCE WITH SEQUENCE OF MARKET RESEARCH SPECIFICATIONS. ADDITIONAL INFORMATION OR CLARIFICATION REQUIRED IS SUMMARIZED UNDER APPROPRIATE SECTION NUMBER. PARENTHETICAL PAGE REFERENCES APPLY TO CONTRACTOR'S REPORT.

3.21 AND 3.22

AS STATED IN "BACKGROUND INFORMATION FOR RESEARCH CONTRACTOR - APPLICABLE EXCHANGE RATES" TRANSMITTED AT TIME OF CONTRACT AWARD, DOLLAR VALUES FOR YEARS 1975 AND THEREAFTER ARE TO BE CONVERTED AT 1974 EXCHANGE RATE. RECONVERT ALL DOLLAR FIGURES FOR YEARS 1975 THROUGH 1978 IN TABLES 1, 2, 3, 6 AND TEXT.

REPORT STATES (P. 12) THAT EQUIPMENT LISTED AS "GROUP ONE", I.E., SPECIFICALLY DESIGNATED AS FOOD PROCESSING EQUIPMENT ONLY, USED IN CALCULATIONS OF MARKET SIZE. TOTAL MARKET SIZE AND TOTAL IMPORTS SHOULD INCLUDE THE SHARE OF "GROUP TWO" ITEMS THAT COMPRISE FOOD PROCESSING EQUIPMENT AS WELL AS ALL "GROUP ONE" ITEMS. ESTIMATE PERCENTAGE "GROUP TWO" ITEMS USED IN FMO PROCESSING INDUSTRY AND ADJUST FIGURES IN TABLES 1, 2, 5, 6 AND TEXT ACCORDINGLY.

TABLE GIVING CONFINDUSTRIA DATA ON FOOD PROCESSING EQUIPMENT (P. 4) SHOWS MARKET SIZE DIFFERING FROM THAT GIVEN IN TABLE 1 FOR YEAR 1972; ON OTHER HAND, MARKET SIZE FOR YEAR 1973 IS THE SAME IN BOTH TABLES. IN VIEW EVALUATIONS GIVEN ON RELIABILITY OF CONFINDUSTRIA FIGURES (PP. 3, 10) AND APPARENT INDICATION UCMA MEMBERS ACCOUNT FOR ONLY 40 PERCENT OF TOTAL PRODUCTION (P. 3), THE PRODUCTION FIGURES GIVEN BY CONFINDUSTRIA IN TABLE DIFFICULT TO INTERPRET. INDICATE WHAT PERCENT OF TOTAL PRODUCTION IS REPRESENTED BY FIGURES IN CONFINDUSTRIA TABLE (P. 4), AND PROVIDE EXPLANATION FOR 1972 DISCREPANCY/1973 CORRELATION BETWEEN TOTAL SALES FIGURES IN CONFINDUSTRIA TABLE AND TOTAL SALES GIVEN IN TABLE 1.

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TOTAL IMPORT FIGURES GIVEN IN TABLE 5 CORRESPOND TO 1972-73 GROWTH RATE GIVEN IN TEXT (P. 23); HOWEVER, TOTAL IMPORT FIGURES GIVEN IN TABLE 6 FOR YEARS 1974 AND 1978 APPEAR LOW IF CORRESPONDING GROWTH RATES (P. 23) ARE APPLIED. EXPLAIN APPARENT DISCREPANCY AND/OR REVISE TABLE 6 FIGURES OR TEXT GROWTH RATES TO REFLECT ACCURATE PROJECTIONS.

3.2105

FIGURES FOR SALES OF QUICK-FREEZING EQUIPMENT NOT GIVEN. SUPPLY THIS REQUIRED INFORMATION.

3.2202

PROVIDE EXPLANATION FOR PROJECTED DECLINE IN U.S. SHARE OF IMPORTS (P. 24).

3.23.01(E)

PROVIDE REQUIRED INFORMATION.

3.31.01(B)

INDICATE WHETHER SALES VALUES GIVEN IN TABLE 8 (P. 34) REPRESENT SALES BY MANUFACTURERS, WHOLESALERS OR RETAILERS.

3.31.01(B) AND 3.32.01(A)

PRODUCTION DATA GIVEN IN TABLE 8 FOR DAIRY SECTOR APPEARS TO EXCLUDE PRODUCTION OF RETAIL MIL (SEE P. 57). PROVIDE FOR TABLE 8 TOTAL QUANTITY 1971 PRODUCTION ALL DAIRY PRODUCTS, INCLUDING RETAIL MILK.

3.31.01(B) AND 3.32.01(D)

CAPITAL INVESTMENT FIGURES GIVEN IN TABLE 8 FOR FATS AND OILS SECTOR DIFFERS FROM FIGURE GIVEN IN TEXT (P. 66). PROVIDE EXPLANATION FOR DISCREPANCY AND/OR REMEDY STATISTICAL ERROR.

3.32.01(C)

SIZE OF "LARGE COMPANIES" (PP. 59, 66) NOT MADE CLEAR. PLEASE SPECIFY.

3.32PQKE)

LISTS OF PLANNED PROJECTS (PP. 55-56, 59, 62, 65, 67) USELESS WITHOUT MORE SPECIFIC INFORMATION. PROVIDE, AT LEAST FOR LARGE PROJECTS, THE APPROXIMATE START DATE AND TYPES OF FOOD PRODUCTS TO BE PROCESSED.

3.40.01(D), (E) AND (F)

PROVIDE REQUIRED INFORMATION FOR EACH SECTION. SECTION 3.40.01(F) PARTICULARLY IMPORTANT IN VIEW ANALYSIS
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TABLES 1 AND 6 WHICH REVEALS IMPORTS PROJECTED TO GROW AT FAR LOWER AVERAGE ANNUAL RATE (4 TO 4.5 PERCENT) BETWEEN 1974 AND 1978 THAN MARKET SIZE (16 TO 17 PERCENT). SUCH ANALYSIS INDICATES ABOVE-AVERAGE GROWTH PROSPECTS FOR DOMESTIC PRODUCTION.

3.33.01(A) AND (B)

PROVIDE INFORMATION ON (1) LOCATION AND (2) CAPACITY OF CHEESE PROCESSING SYSTEM (P. 69). INGERSOLL

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Message Attributes

Automatic Decaptioning: X
Capture Date: 01 JAN 1994
Channel Indicators: n/a
Current Classification: UNCLASSIFIED
Concepts: n/a
Control Number: n/a
Copy: SINGLE
Draft Date: 30 AUG 1974
Decaption Date: 01 JAN 1960
Decaption Note:
Disposition Action: n/a
Disposition Approved on Date:
Disposition Authority: n/a
Disposition Case Number: n/a
Disposition Comment:
Disposition Date: 01 JAN 1960
Disposition Event:
Disposition History: n/a
Disposition Reason:
Disposition Remarks:
Document Number: 1974STATE191460
Document Source: CORE
Document Unique ID: 00
Drafter: COM/BIC/OIM/MRD:KWRIGHT:YLH
Enclosure: n/a
Executive Order: N/A
Errors: N/A
Film Number: D740242-0419
From: STATE
Handling Restrictions: n/a
Image Path:
ISecure: 1
Legacy Key: link1974/newtext/t1974083/aaaaabyj.tel
Line Count: 162
Locator: TEXT ON-LINE, ON MICROFILM
Office: ORIGIN COME
Original Classification: UNCLASSIFIED
Original Handling Restrictions: n/a
Original Previous Classification: n/a
Original Previous Handling Restrictions: n/a
Page Count: 3
Previous Channel Indicators:
Previous Classification: n/a
Previous Handling Restrictions: n/a
Reference: STATE A-1665
Review Action: RELEASED, APPROVED
Review Authority: boyleja
Review Comment: n/a
Review Content Flags:
Review Date: 10 JUN 2002
Review Event:
Review Exemptions: n/a
Review History: RELEASED <10 JUN 2002 by reddocgw>; APPROVED <27 JAN 2003 by boyleja>
Review Markings:

Declassified/Released
US Department of State
EO Systematic Review
30 JUN 2005

Review Media Identifier:
Review Referrals: n/a
Review Release Date: n/a
Review Release Event: n/a
Review Transfer Date:
Review Withdrawn Fields: n/a
Secure: OPEN
Status: NATIVE
Subject: GLOBAL MARKET RESEARCH: FOOD PROCESSING AND PACKAGING EQUIPMENT - ITALY
TAGS: BEXP, BFOL, IT
To: MILAN
Type: TE
Markings: Declassified/Released US Department of State EO Systematic Review 30 JUN 2005